ASSET CASE MANAGEMENT FUNCTION

3-9 ____MANAGE FOLLOW-UPS____

The Manage Follow-ups function in ASSET tracks information about a customer who has a system generated exit.

The information gathered in Manage Follow-Ups is organized into three different areas:

1. **Follow- up Credentials** – where workers report that a certificate/ credential was earned during participation or after exit. (See WIA Policy Update 06-07).
2. **Follow-up Status** – where workers report employment for the first, second and third quarters after exit. The reporting quarters are listed at the top of each tab.
3. **Follow-up Services** – where workers document the services that are provided to a customer in the 90 days preceding program exit and after program exit.

The Manage Follow-Ups function is launched from the Menu Tree. Clicking on this option opens the ASSET Customer Search page. Workers will need to perform a search to find the customer about whom a Follow-Up is being reported. The search is done by entering the Search or Advanced Search criteria for the customer.

The first page displayed is the Follow-Up Summary for the selected customer. This page is divided into the three sections mentioned above – Credentials, Status and Services. Under each section, any item with historical information on the database will have that information listed.

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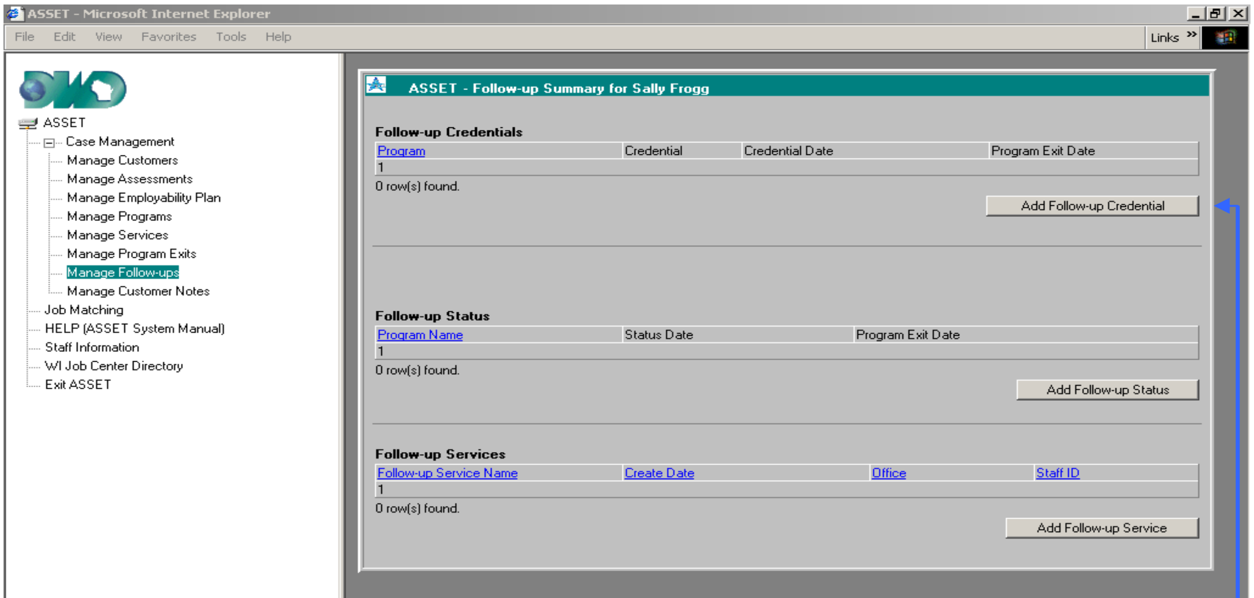
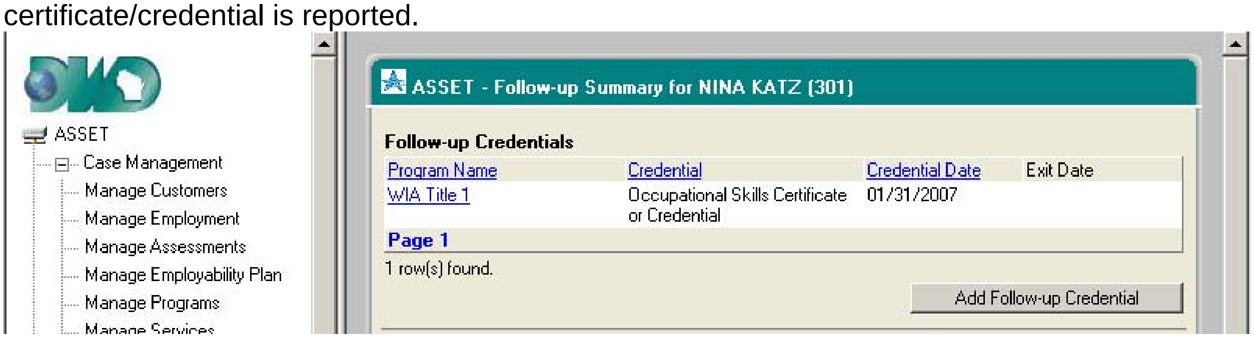
The Follow-up Summary Screen looks like this:



Follow-Up Credentials

The Credential section of the Manage Follow-Up function is the location where workers report the certificate/credential attainment. This section is available to workers at anytime during the individual's participation in the program

Workers add certificate/credential information by clicking on the Add Follow-Up Credential button. This takes the worker to a screen that displays the programs for which a certificate/credential is reported.



Certificates/credentials, can be reported for any program once a program registration is present in ASSET. Clicking on the program link (underlined) will open the Credential screen. It looks like the one on the next page.

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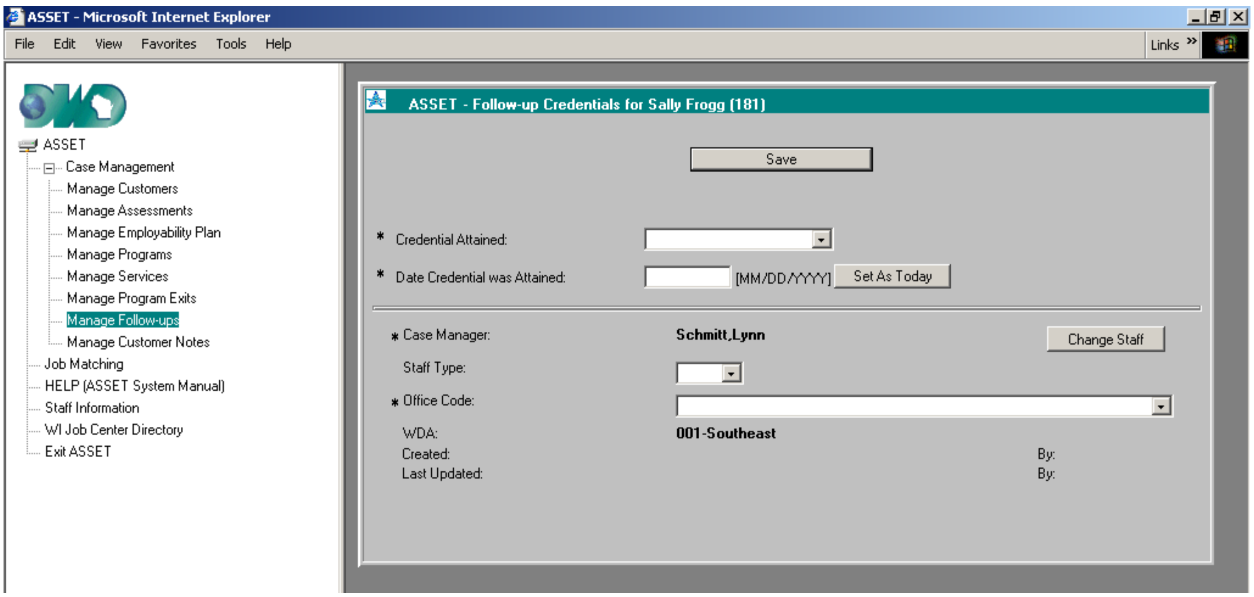

This page includes only a few fields of information. They are:

FIELD	REQUIRED	DESCRIPTION
• **Credential Attained**	Yes	This field is entered from a dropdown menu. Valid values are: • High School Diploma • GED or HSED • AA or AS Diploma/Degree • BA or BS Diploma/Degree • Occupational Skills License • Occupational Skills Certificate or Credential.
• **Date Credential was Attained**	Yes	The date the certificate/credential was attained. This date cannot be a future date.

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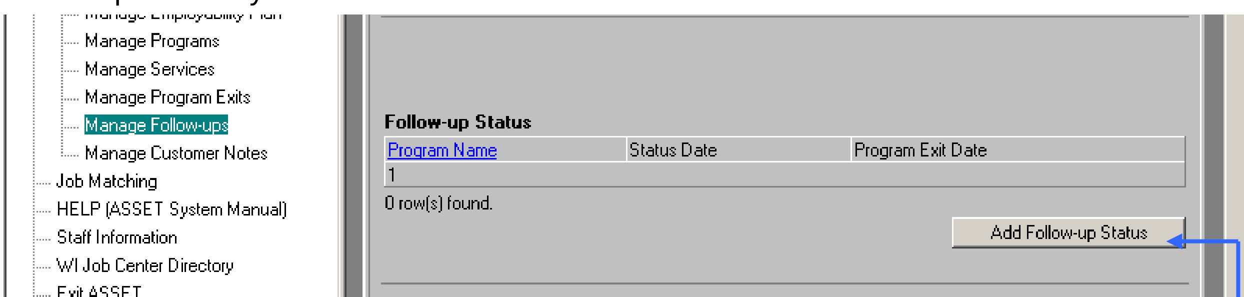
FIELD	REQUIRED	DESCRIPTION
• **Case Manager**	Yes	The name of the Case Manager, defaulted from the logon.
• **Staff Type**	No	Blank unless an LVER or DVOP (Veteran Staff)
• **Office Code**	Yes	Defaults to the Office if the User logged on, but may be changed if not correct.

Clicking the Save button returns the user to the Follow-Up Summary page where the newly reported credential will appear on the historical list.

Follow-Up Status

The Follow-Up Status section is used to record post-Exit information about employment or WIA Title 1 Youth outcomes.

When viewing the Follow-Up Summary screen, the Status section appears in the middle of the Follow-up Summary screen.



Follow-up Status information can be reported for each program the customer received services from. Each program will be listed in the Program Name column. Workers may select that record by clicking on the underlined link in the row and add the appropriate quarterly follow-up data as appropriate. If no Follow-Up Status exists, the worker may click on the Add Follow-Up Status button.

The first screen that displays is the Programs Eligible for Follow-Up. ASSET determines this by checking to see if there has been an Exit completed for this customer. All programs must have been exited for a Follow-Up Status to be reported. This is the screen displayed when an exit has occurred.

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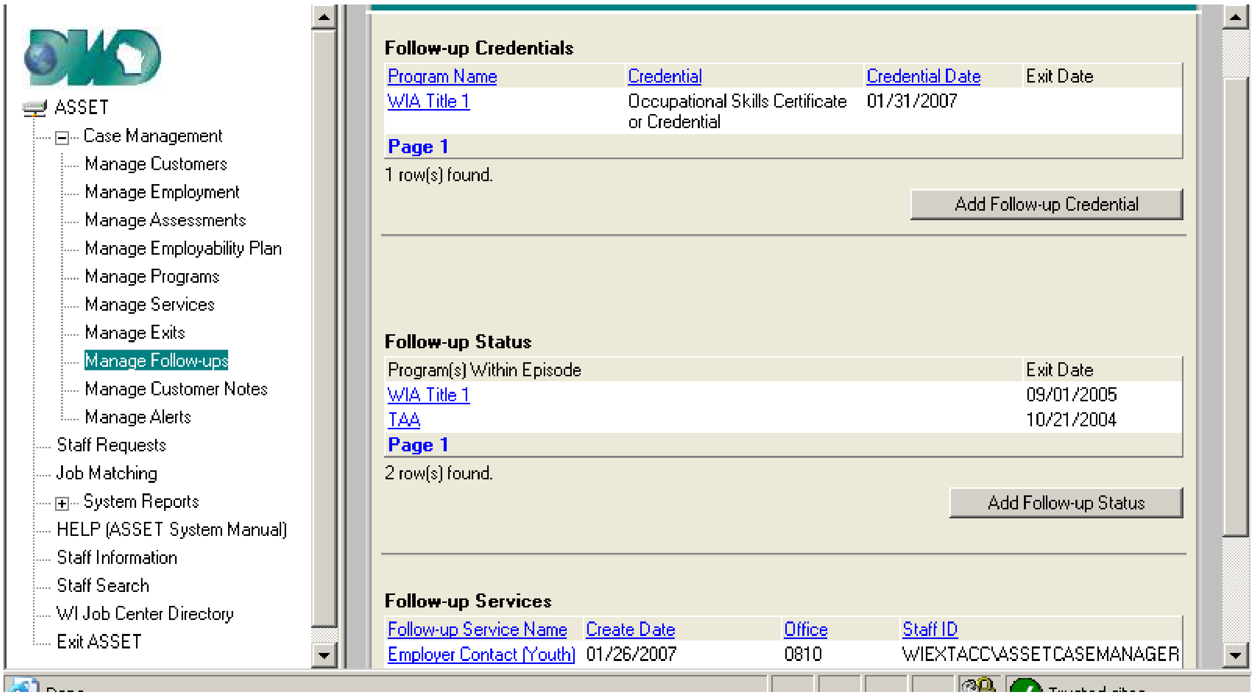
3-9 ____MANAGE FOLLOW-UPS____



When the customer is eligible for Follow-Up status reporting, click below the Program(s) Within Episode link (like the one highlighted in the example above) and it will open the Follow-Up Status screen. It looks like this:

ASSET CASE MANAGEMENT FUNCTION

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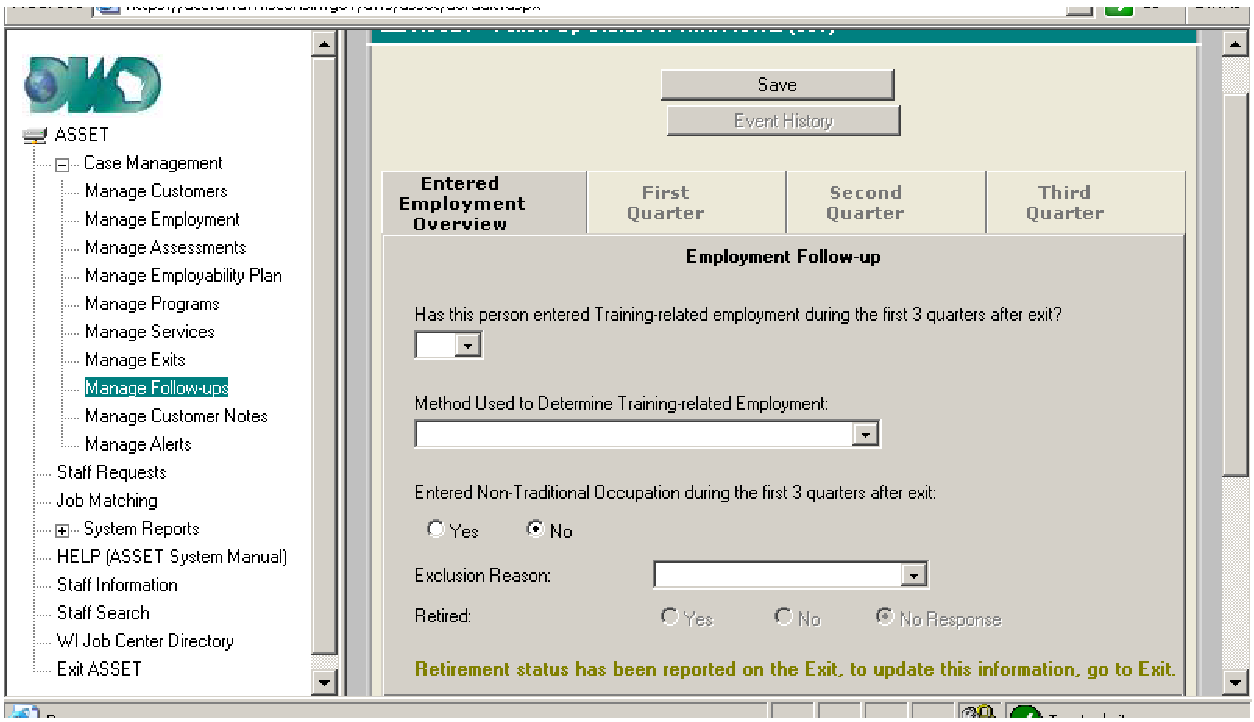

Tab 1: Entered Employment Overview

The information collected on this screen may be updated at any time.

The fields on the Entered Employment Overview tab are:

FIELD	REQUIRED	DESCRIPTION
• **Has this person entered Training-related employment during the first three quarters after exit?**	No	Dropdown box with the following options: • Yes • No Note: Once a Yes response is saved, only staff with JCS Admin access can change the selected response.

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FIELD	REQUIRED	DESCRIPTION
• **Method Used to Determine Training-related Employment:**	No	Dropdown box with the following options: • Compared occupation code of the training to job • Compared industry with the occupation of the training • Other appropriate method
• **Entered Non-Traditional Employment During the First Three Quarters After Exit**	No	Yes/No radio button to indicate if this person has entered a non-traditional occupation based on WIA policy definition
• **Exclusion Reason**	No	Dropdown box with following options (used for performance exclusions). This field is grayed out if a response was entered and saved on the Exit screen. • Incarcerated/Institutionalized • Health/Medical • Deceased • Family Care • Reservist Called to Active Duty • Relocated to Mandated Residential Program (Youth Only)
• **Retired**	Yes	Radio Button. Select either Yes or No to reflect the customer status at follow-up. The No Response is a system default button only. This field is grayed out if a response was previously entered on the Exit screen.
• **Recalled by Layoff Employer**	Yes	Radio Button. Select either Yes or no to indicate if the participant at follow-up was recalled by the employer/agency that they were laid off from at the time of TAA participation.

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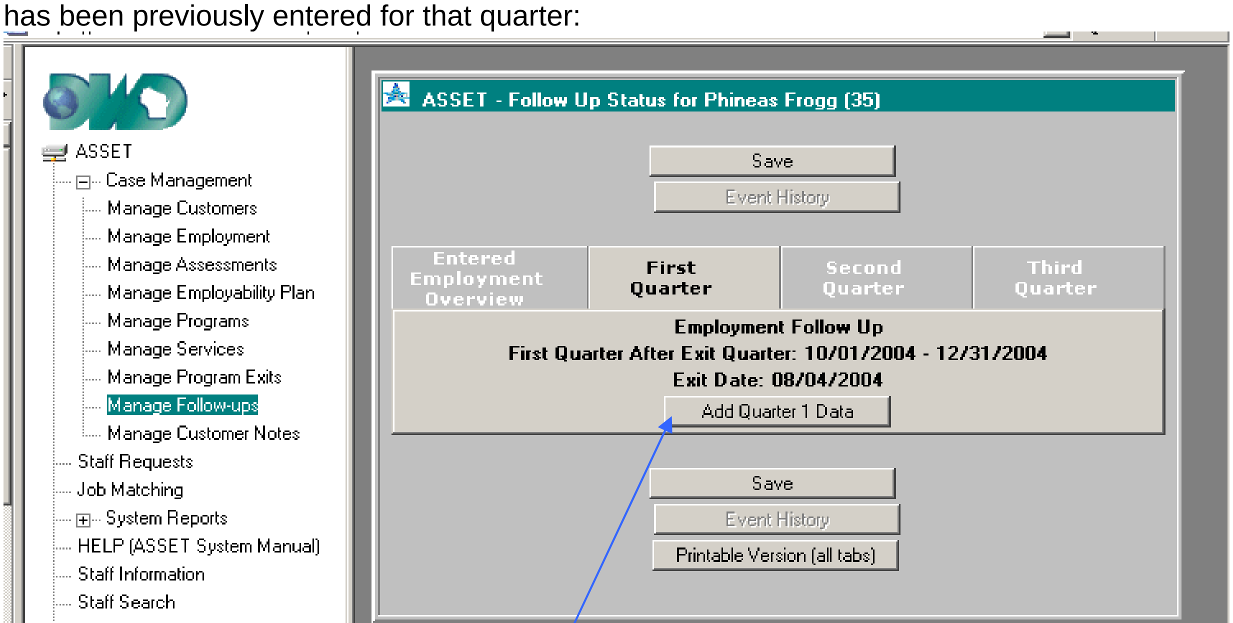
Tab 1, 2, 3, First Quarter, Second Quarter, and Third Quarter.

When the worker clicks on any of the other tabs, the following interim screen appears if no data has been previously entered for that quarter:



When a worker clicks on one of the Quarter tabs, the information appears in bold print. ASSET prevents data entry on the tab before the first day of the After-Exit quarter. Workers may want to wait until the end of the quarter to get and report the most accurate information available for the After-Exit quarters.

Click on the appropriate Add Quarter Data button and the data entry screen displays and looks like the one on the next page.

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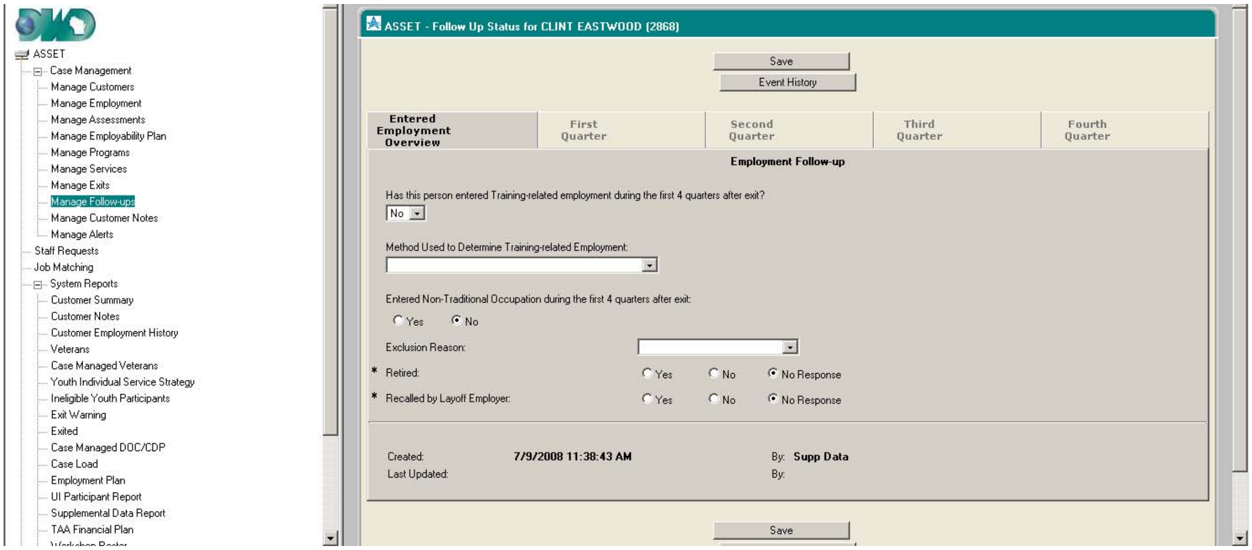

The first section is **Youth Status** and is used for the WIA Title I Youth Program. All Youth exits must have one of the responses selected depending on the youth status **at registration**, i.e. Younger Youth/Older Youth. These fields are used for WIA Title IB Performance Measures, so it is important to complete this field. Staff should ensure that the placement reported corresponds to the youth program.

The Field Descriptions are:

FIELD	DESCRIPTION
• **Youth Placement/Retention**	Dropdown menu includes the following options: • Entered post-secondary education • Entered advanced training • Entered Military Service • Entered a qualified apprenticeship

The Second section is used to identify the **Employment Status**. The fields for data entry are:

FIELD	DESCRIPTION
• **Employment Status**	Yes or No Radio buttons. Identifies whether or not the person was employed at anytime during this quarter.
• **Supplemental Data Status**	Has two values – Necessary or Not Necessary, and defaults to Not Necessary. This field is updated by a batch job each quarter and will be changed to "Necessary" if no wages are found for the client on the UI Wage file. This field is updatable only by an Administrator level staff.

The Third section is the **Supplemental Employment Information for Federal Reporting**. Currently the information recorded is only used for Title I. The fields for data entry include:

FIELD	DESCRIPTION
• **Total Wages Paid in Quarter from Supplemental Employment**	Numeric Text field to indicate the total wages earned by this individual in the calendar quarter being reported. This can be actual (from check stubs) or a calculated

FIELD	DESCRIPTION
	amount. (Response not necessary for performance.)
• **Out of State Employment**	Yes or No Radio buttons. A Yes response indicates that the employment is located outside of Wisconsin. Non-Wisconsin employment is not reported on the Wisconsin State Wage Record system, however the WRIS (Wage Record Information System) is used which has other states' UI wage information.
• **Self Employment**	Yes or No Radio buttons. A Yes response indicates that the person is self-employed. Self Employment is not reported on the Wisconsin State Wage Record system.
• **Other Non-UI Covered Employment**	Yes or No Radio buttons. A Yes response indicates that the employment is with an employer that is not required to report wages on a quarterly basis to the Wisconsin State Wage Record system. See the UI Division's web site for a complete description of excluded employment.
• **Supplemental Data Verification Status**	Dropdown Menu that includes the following options: • Check or Cancelled Check (from employer) • Employer Record (or other written statement) • Income Statement • Not Employed in the Quarter • Not Verified If this field is not completed or if Not Verified is selected, the information provided will not be considered for WIA Performance. Workers must retain a copy of the documentation in the paper case record.

The last section is for **Local Management Reporting** and can be used for all programs in ASSET. This data can be used by staff to predict performance outcomes or to monitor their service provider activities.

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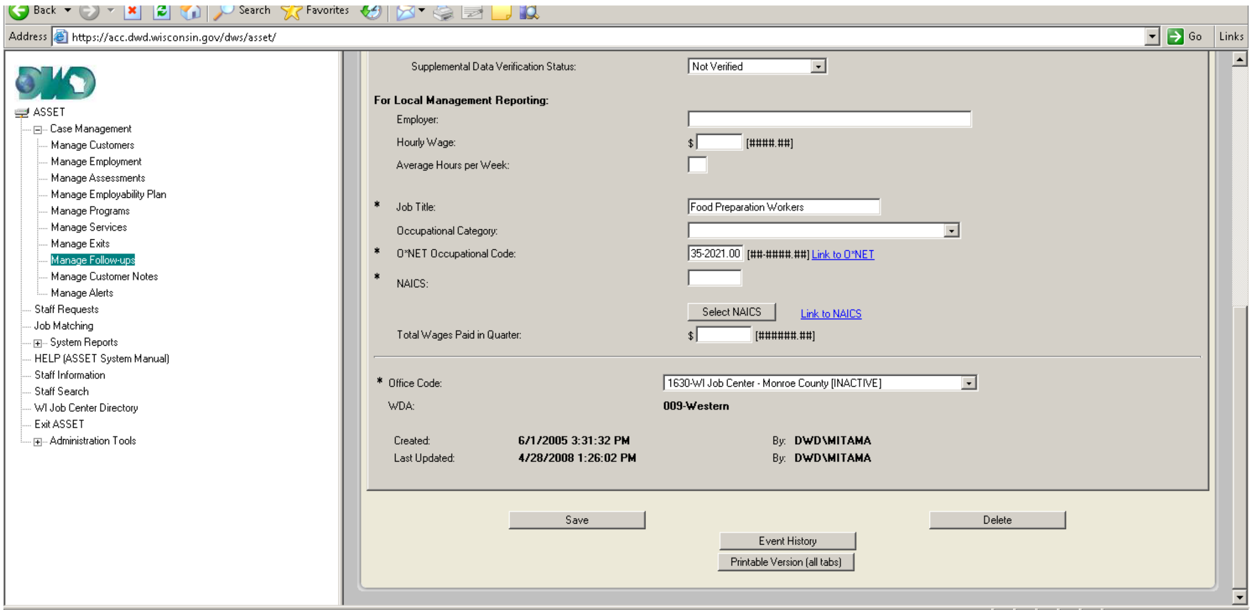
The section will look like this:



Workers should report the information for each of these fields for each quarter. If an individual has more than one employer in a quarter, the information shown should be for the employer as of the end of the quarter, or if multiple concurrent jobs, for the most important job. However, the field for the Total Wages Paid in Quarter should be the **sum** from all employment in the quarter.

Once the data is entered, click on SAVE to update the database. Workers may return to any previously entered quarter's data to update it. **NOTE: Workers should record any new employment on the Employment History in the Manage Customer function so that a complete work history is maintained for the individual.**

A worker may choose to delete any quarter's information by using the Cancel Add Quarter button (as seen on page 8). This should only be done when the customer's information was incorrectly reported or if the customer began a better job in the same quarter.

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The field descriptions for this section are:

FIELD	FIELD DESCRIPTION
• **Employer Name**	Text field for the name of the employer or company. Be as complete and accurate as possible to avoid potential confusion.
• **Hourly Wage**	Text field. Enter the hourly wage for this job. If wage is other than hourly, workers should attempt to factor an hourly wage based on salary, commissions, and in-kind wages. etc.
• **Average Hours Per Week**	Text field to indicate the typical number of hours per week that the individual is scheduled to work.
• **Job Title**	Name of job that the participant was hired into.
• **Occupational Category**	The Occupational Category related to the Job Title.
• **O*NET Code**	The O*NET code is system generated once the occupational category is selected. A worker can use the Link to O'NET to access additional codes if preferred.
• **Select NAICS**	The NAICS code is system generated when a worker clicks on the Select NAICS link.
• **Total Wages Paid in Quarter**	Numeric text field to indicate the total wages earned by this individual in the calendar quarter being reported. This can be actual (from check stubs) or calculated amount.

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Follow-Up Services

The Follow-Up Services section is used for reporting services provided to a customer. Follow-Up services may be provided at any time during program participation or at exit. To record a follow-up service, a participation date must be evident in an episode.

Like the other Follow-Up sections, any Follow-Up Services reported for this customer in the past are displayed in historical rows. Workers may review those services by clicking on the underlined Service link. To report a new Follow-Up Service, click on the Add Follow-Up Service Button. The Services section of the Follow-Up Summary screen looks like this:

The next screen looks like this:

The worker should then click on the appropriate Program Name to enter the Follow-up Service. The screen will look like the one on the next page.

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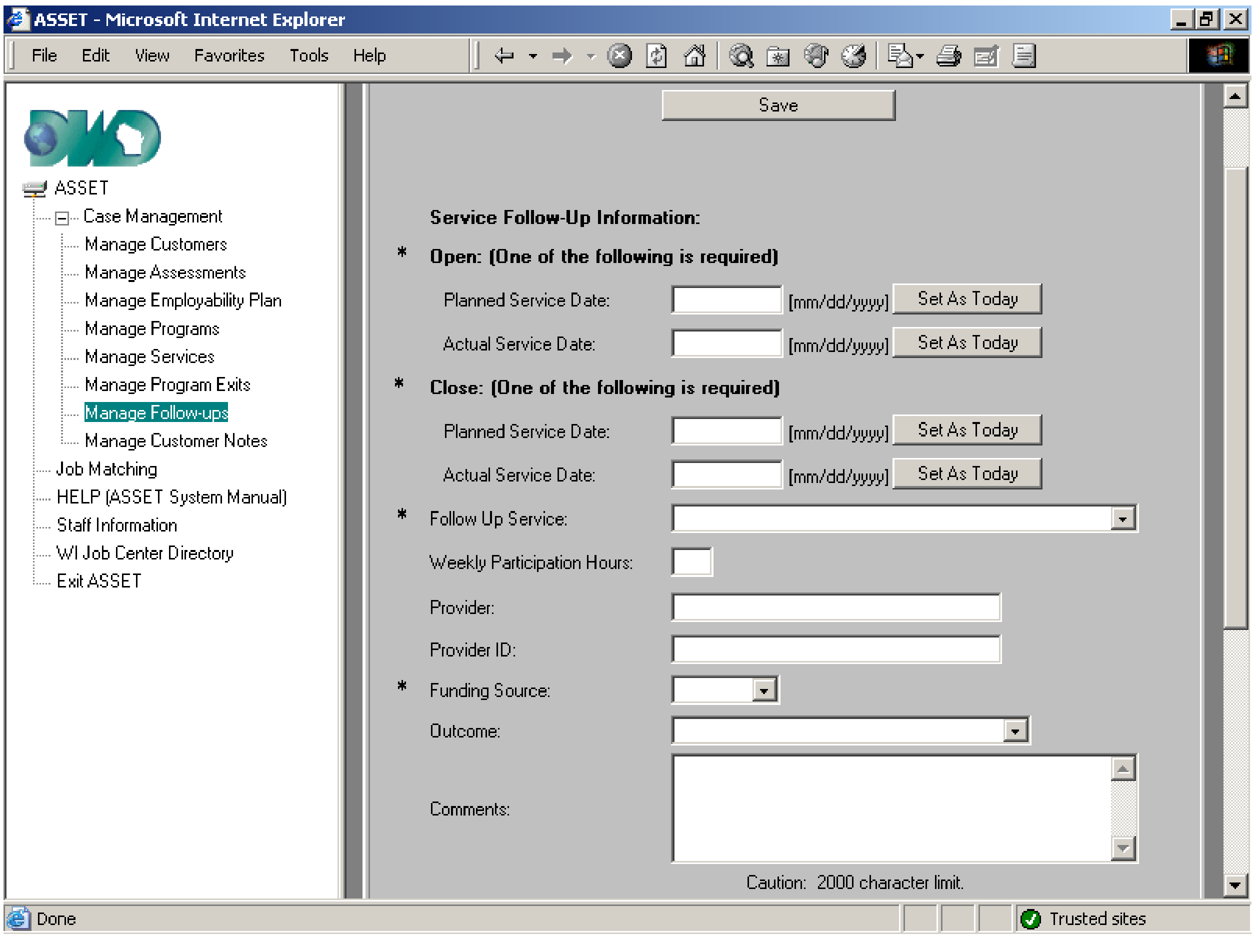

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The data elements captured on this page are:

FIELD	REQUIRED	DESCRIPTION
• ***Open: Planned Service Date Actual Service Date**	Yes	The date the Follow-up Service is either planned to start or actually starts. At least one of these dates must be entered. Note that an Actual Service Date cannot be in the future.
• ***Close: Planned Service Date Actual Service Date**	Yes	The date this service is either planned to end or actually ends. If a planned date, it may be the current date or a future date. If an Actual Service Date, it cannot be a future date.
• ***Follow-Up Service**	Yes	Select from the dropdown list the appropriate service being provided.
• **Weekly Participation Hours**	No	Enter the number of hours per week the worker anticipates the WIA customer will participate in the service or activity.
• **Provider**	No	The name of the Provider who will provide the service.
• **Provider ID**	No	The ID of the Provider.
• ***Funding Source**	Yes	From the dropdown, select either Non-WIA or WIA as the source of the funding for the service.
• **Outcome**	No	From the dropdown, select the response that best describes the result or outcome of the service provided.
• **Comments**	No	Text box that allows the worker to note special information about this follow-up service.
• **By Block**	Yes	The system defaults to the User and Office of the person logged on, but this may be changed as appropriate.

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